Application Form

Profile

If you have any questions or have difficulty submitting this application, please reach out to Alex Guzhnay at aguzhnay@newhavenct.gov or 203-946-7670.

Sheena
First Name

Middle Initial

Strawter-anthony
Last Name

sstrawter-anthony@wcgmf.org
Email Address

748 Quinnipiac Ave
Home Address

Suite or Apt

New Haven
City

CT
State

06513
Postal Code

What ward do you live in (optional - please select ward if you know)?

None Selected

Home: (917) 704-4821
Primary Phone

Alternate Phone

Are any of the above number a cell phone number?

◉ Yes ○ No

If so, which? Also, is it okay to send a text message?

Yes

William Caspar Graustein Memorial Fund
Employer

Director of Impact Investment Strategy
Job Title

To see our list of Boards and Commissions please click here: https://www.newhavenct.gov/government/boards-commissions/boards-commissions-listed

Which Boards would you like to apply for?

City Employees Retirment Board: Submitted

Is this an appointment or reappointment request? *

☑ Appointment

Interests & Experiences

Please tell us about yourself and why you want to serve. Please attach any of the follow:
Resume, Curriculum Vitae (CV), Professional Bio, or a Statement of Interest.

Sheena_Strawter-Anthony_Resume_June_2022.pdf

Upload a Resume

Are you currently employed by the City of New Haven or the New Haven Public School System?

○ Yes ⦿ No

Why are you interested in serving on a Board or Commission?

I believe that my experience will be benefit to the Board

Why do you believe you would be a good fit for your selected Board and Commissions?

I have 20 years of experience of working in the financial services industry where I've analyzed investments, developed strategies and managed portfolios for institutions and individuals. I have also worked with / developed financial plans for city workers and retirees of various income backgrounds giving me insight into the personal financial management of everyday individuals.

Do you have any time commitments that would prevent you from participating in the board/commission meetings?

I am the Director of Impact Investment Strategy at the William Caspar Graustein Memorial Fund where traveling is big part of my role. However, the work probably benefits the Board as the travel is to Investment conferences where I meeting investment managers, discussing investment themes, etc.

Demographics

In order to stay compliant with State Statute, what is your political affiliation on your voter registration?

Democrat

In order to stay compliant with our city's charter, are you registered to vote in New Haven?

○ Yes ⦿ No

We strive to maintain diversity in all of our Boards and Commissions. These questions are optional and if you volunteer the information we will only use it to ensure that our boards and commissions are diverse.

Ethnicity

- [x] African American

Gender

- [x] Nonbinary or third gender

How did you hear about serving on our Boards & Commissions?

Sheena Strawter-Anthony

E: sa@feelgoodinvestments.co | C: +1 917-704-4821

EDUCATION

EDHEC BUSINESS SCHOOL *Nice, France*

Master of Business Administration with an International Finance Specialization *January 2012 – January 2013*

- Scholarship Award Recipient, Sustainable South Africa course, Strategy consulting project

HAMPTON UNIVERSITY *Hampton, VA*

Bachelor of Science in Banking and Finance with Political Science elective *August 2003 – May 2007*

- Bank of New York and Nationwide Intern and Scholarship Award Recipient, Dean's List

EXPERIENCE

FEEL GOOD INVESTMENTS *New York, NY*

Cofounder and Chief Investment Officer *April 2020 – Present*

- Manage the design, build, and launch of a sustainable business and investment advisory practice that focuses on financial wellness and conscious investments.
- Implement strategies, operational models, and processes to provide low-cost yet impactful financial planning, asset management and business consulting services to women and people of color.
- Advise entrepreneurs on pricing, funding, lean, design-thinking, and agile development through workshops and individual consultations.
- Evaluate financial plans, investments, and provide a platform that enables individuals to save and invest.
- Secure business opportunities and deploy marketing strategies to further brand equity and increase financial literacy.
- Build learning and development programs through videos, articles and training modules on sustainable investing, financial planning, and business management.
- Manage a business portfolio that includes Mental illness, Eco-Retreat, Alternative medicine and Black haircare businesses, and client portfolio of women, BIPOC and low middle income individuals.

SYNPULSE *New York, NY*

Manager *December 2018 – March 2020*

Senior Management Consultant *July 2017 – December 2018*

Management Consultant *February 2016 – July 2017*

- Member of Banking and Insurance Practices; reported directly to Managing Director.
- Advised clients on digital transformations, data driven financial products, agile project management, market entry and new business launches.
- Head of USA ESG initiative; designed an ESG performance management framework that aggregates data on environmental, social and governance results to report on sustainable and impact investments.
- Evaluated, advised, and managed investments for Health, Life and P&C insurers, Investment Banks and Managers to increase customer engagement, manage risk, improve operations and/or enter new markets.
- Managed from inception to launch the development, design and testing of a digital data driven platform through an iterative program of five financial products and supporting electronic and operational processes for a start-up FinTech.
- Established account management, operational oversight, and audit programs for the data migration between third party vendors and distributors for a Life and Health Insurer.
- Led and facilitated executive training on diversity, equity and inclusion which tripled the growth of diverse hires in the Americas; this project lead to the formal creation of D&I committees globally.
- Led sales and marketing initiatives to increase US market share, created articles, spoke at organizations, and participated in working groups to increase talent pipeline and brand presence.

SWORDSPORT *Columbus, OH*

VP, Business Analyst *January 2015 – February 2016*

- Worked directly with CEO and executive leadership team to secure venture capital for the build of a digital platform.
- Created and sustained relationships with business partners, stakeholders, and potential investors.
- Developed roadmaps, financial models, and investor pitchbooks that supported the business and investment case of the digital platform.

GOLDMAN SACHS *London, United Kingdom*

Equity Analyst *November 2013 – December 2014*

- Conducted sell-side business research and analysis on 23 European companies including multi-industry firms Siemens and Philips.
- Managed multi-cultural teams to evaluate market and economic trends of the international sales and operations of companies.
- Led a cross-sector project with Auto, Utility, and Capital Goods teams to identify the viability of investing in the European electric vehicle market.
- Evaluated governmental initiatives, production, and consumer demand of electric vehicles in local languages of French, Spanish and Italian.

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- Created financial models, market commentaries and reports to support research; presented findings to executive leadership and key stakeholders.
- Coordinated with Marketing, Sales and Trading teams to deliver investment recommendations to portfolio managers, chief investment officers and other investors.
- Research covered multiple business segments including Healthcare, Consumer Goods, Industrials and Utilities, and multiple geographic regions including Europe, North America, Asia, Middle East, and Africa,

EMERGING MANAGERS & CONSULTANTS *France, United States*
Strategy Consultant *May 2012 - October 2013*

- Performed competitive research and benchmarking for emerging fund managers and investment consultants.
- Produced white papers on the business environment and allocation of assets by pension funds to small/mid-size investment managers and consultants.
- Developed a market entry strategy for a Women-owned French investment consultant to enter the UK pension fund market.
- Conducted research and produced presentations on the impact of reporting and business tracking platforms to increase awareness, transparency and credibility of Minority and Women-owned Hedge Funds.

THE VANGUARD GROUP Malvern, *PA*
Investment Analyst *October 2008 - December 2011*
Leadership Development Candidate *July 2007 – October 2008*

- Led Diversity and Client Investment Committees; was the youngest member to be elected to these roles.
- Managed a cross-functional team to successfully implement a process to produce and present investor material through a co-browse feature that allowed advisors to conduct virtual performance reviews.
- Revamped investment research website into a robust tool that presented incisive and user-friendly thought leadership on active/passive, domestic/international, equity/bonds and other portfolio methodologies.
- Trained financial advisors on portfolio construction, asset allocation and the impact of market and economic trends on client portfolios.
- Advised investment managers and financial advisors on investment strategy, and developed solutions to improve client investment services.
- Created investor material, analyzed securities, and made investment recommendations for institutional and high net worth clients.
- Led strategic initiatives in the Retail, Brokerage and Asset Management departments.
- Integrated sales and operations of brokerage activities to streamline end-to-end customer workflows.

LICENSES AND CERTIFICATIONS

FINRA *New York, NY*
Uniform Investment Advisor Law Exam and Securities Industry Essentials *March 2021 – November 2021*

- Active Series 65 and SEI, Inactive Series 7 and 63 licenses

SASB *New York, NY*
Fundamentals of Sustainability Accounting Credential holder *May 2020 – May 2021*

- Sustainable principles, practices, application and analysis exam completions

ACTIVITIES

CFP BOARD *New York, NY*
Certified Financial Planner candidate with Howard University and Dalton Education *2020 - Present*

IMPACT CAPITAL FORUM *New York, NY*
Member and participant in Opportunity Zones working sessions *2019 - present*

GIIN IRIS+ *New York, NY*
Member of working groups to help update impact metrics *2019*

SKILLS AND INTERESTS

- Language: proficient in French
- Computer: MS Suite, JIRA, Confluence, Trello, Salesforce, Bloomberg, Morningstar, FactSet
- Project Management: Waterfall, Agile, Scrum, Kanban, Lean, Design Thinking